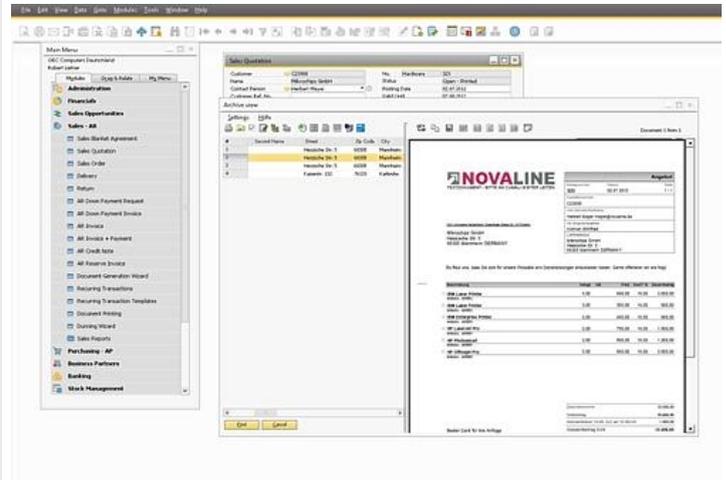# ■ Archive.One ■

Add-on for SAP® Business One

to archive documents and

e-mails.

Overview

The **document archiving** for SAP Business One was designed to make paper intensive processes economically and cost-effectively.

It is integrated into SAP Business One® in such a way that documents generated there (offers, invoices, etc.) are printed and simultaneously indexed, linked to the relevant address and filed in the archive.

During document processing, the user can display previously archived documents in SAP Business One ® (offers, invoices etc.) without changing programs. Search creteria are indexes like kind of document, address, document number, keywords (full-text), date etc.

Further documents which are not created in SAP Business One ® (e.g. Word documents, incoming and outgoing e-mails or faxes) may be comfortably archived as well as documents in paper form via an expansion module.

E-Mail Archiving is oriented to the post-boxes of each user and to the e-mail addresses of business and contact partners within SAP Business One. To these addresses incoming and outgoing e-mails (incl. attachment) will be archived. A status information delivers an overview of archived, blocked, non allocable e-mail addresses and even those e-mails which still have to be archived.

- Automatic indexing for outgoing documents
- Document recognition for additional outgoing documents (only PDF-documents)
- Full text indexing / OCR[1]
- Extensive search (key words, full text, index, time periods)
- Automatic allocation of documents via ScanCode
- Export of archived documents (´Mobile Archiving´, e.g. for field work)
- Document management with templates and version management
- Document linking
- Automatic archiving of incoming and outgoing e-mails including the attachments out of MS Outlook, Exchange-Server and Tobit (David/ InfoCenter)
- Interface to Novaline Workflow
- Resubmission
- Integration in Windows Explorer
- Drop-box functionality with the possibility of e.g. E-mails (Outlook), documents, files, etc. by drag & drop to business partners, document types, etc. to archive automatically

System requirements

- Client: Windows 8.1©, 10©, 11©
- Server: Windows 2012, 2016©, 2019©, 2022©
- Database: MS SQL-Server 2014©, 2016© , 2017©, 2019©

Workstation license (WSL)

- Administration incl. advanced rights management
- Direct filing of documents in binary form in the database
- Interface to SAP Business One
- Presetting of the automatic indexing (key words, full text) for outgoing documents from SAP Business One
- Automatic archiving of outgoing documents out of SAP Business One
- Sending e-mails including archiving out of SBO documents
- Document viewer
  - Search: full text search/index search/limited search
  - Selective list view or tree view
  - versatile filter facility

Extended workstation license (requirement: WSL)

Extension of the workstation license for the following functions and features:

- Configuration of document features (category, type, up to 5 user-defined fields)
- Scanning and archiving of incoming documents with indexing and OCR text recognition[1]
- Automatic indexing suggestion of scanned documents from purchase and/or sales vouchers out of SAP B0
- Sending/forwarding of digitalized documents out of the scan modus to other archive users
- Automatic allocation of documents via ScanCode
- Archiving of faxes, Word documents, Excel sheets and so on via printer output
- Extension file formats: PDF, TIF, JPG, BMP, WAV, AVI
- User-defined SQL interface for additional address sources via OLE DB driver
- Internal linking of archived documents

E-Mail Archiving by Outlook Add-in

(For full text search a full license for OCR text recognition Omnipage is required)

- Manual archiving of incoming and outgoing e-mails including the attachments out of MS-Outlook post-boxes
- Automatic assignment of business partner address
- Direct connection to Outlook 2013 / 2016 / 2019 (Add-in)
- supports 32 & 64 bit of Microsoft Outlook
- archiving of e-mails with connection to Novaline workflow
- can be installed and licensed as a stand-alone solution without Novaline archiving
- To view archived e-mails a workstation license or a research workplace is required

E-Mail-Archiving/Server (requirement: E-Mail Archiving so.)

- Automatic archiving of incoming/outgoing e-mails including the attachments out of Exchange-Server 2010/2013/2016/2019

Research-workplace

- Document viewer only for searching and viewing archived receipts and emails

1 = Modul „OCR text recognition Omnipage™" necessary (subject to the scope of services of the OCR manufacturers)
2 = Modul „OCR barcode Omnipage™" necessary (subject to the scope of services of the OCR manufacturers)
© = registered trademark oft the Microsoft-Corporation
™ Omnipage is a product of the Kofax Deutschland AG

Document Management

(available on each extended workstation)

- Template management incl. embedded editor
- Check in/check out of documents
- Version management

Document processing for pdf-documents

(requirement: minimum 1 WSL)

- Stamp design with color map for receipt stamp, booking stamp etc., date and if necessary editor
- Stamp set
- Write comments and detection of editor, date and color allocation per editor
- Highlighter function

Document recognition for outgoing documents

- Definition of the structure of various outgoing documents (from SAP BO and other applications, e.g. MS Excel and Word) for recognition and automatically differentiating or supplementing indexing (document-type / -number, date, address)
- Supplementing allocation from SAP BO documents into user defined fields possible

Scanmonitoring (requirement: minimum 1 WSL + 1 extended WSL)

- Manual, automatic or time-controlled transmission of previously scanned documents into the database
- Use of OCR text recognition
- Scancode and barcode check

Resubmission (requirement: minimum 1 WSL)

- Archived documents can be provided with a resubmission to specific users
- Automatic reminder function for resubmission dates

Archive outsourcing (requirement: minimum 1 WSL)

- Possibility of outsourcing documents including keywording (complete)
- Possibility of outsourcing documents, whereby the keywords remain in the archive
- outsourcing possible in test mode
- set filters to outsource specific documents with the possibility of restriction by customer, data type, document type, period, database, scan code, etc.
- Swapping to a specific directory or optical drive

OCR Text recognition Omnipage™

(requirement: minimum 1 WPL, minimum 1 extended WSL)

- Integration of the OCR text recognition Engine Omnipage

OCR Barcode Omnipage™

- Recognition of 1D barcode

Mobile Archiving

- Export of archived documents
- Storage onto extern data mediums (USB-Stick, CD etc.)
- View of previously exported archived documents (e.g. laptop)

Miscellaneous

- Workflow + Document recognition for Archiv.One (Content: see the separate description of services / price list Workflow for Archiv.One)

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